

Tuesday, 13 October 2020



United Kingdom

Loss of flights

-1.0M (-71%)

Dep/Arr flights vs. 2019
since 1st March

Total economy GDP²

-9.5%

2020 vs. 2019

Key facts:

Flights last week vs. 2019:

- Heathrow -57%
- Gatwick -82%
- Ryanair -58%
- British Airways -60%
- EasyJet -74%
- Domestic flows -53%
- European flows -62%

Loss of Passengers¹

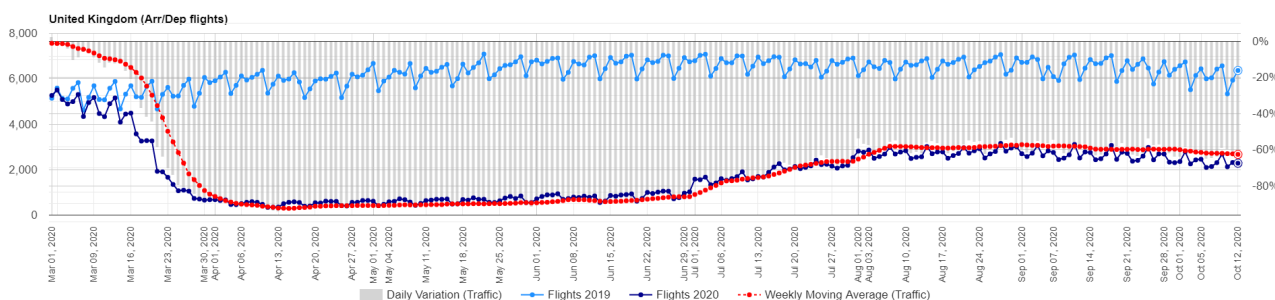
-158M (-83%)

2020 vs. 2019

Total job losses³

-700k

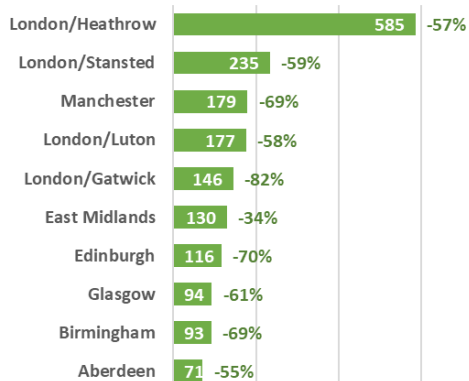
Since March 2020



- **COVID Crisis/Economy:** UK has been badly affected by the COVID crisis. UK is ranked 5th worldwide in terms of deaths⁴. Economy is severely impacted with an expected GDP decrease of 9.5% in 2020.
- **Traffic:** Traffic started to decrease on 17 March reaching -92% of 2019 mid-April. It slowly bounced back to reach -58% during the first week of August. The top traffic was reached on 28 August with 3,154 departing /arriving flights. Overall, UK is the European country having experienced the highest loss of traffic with -1M flights since March compared to 2019 and an overall loss of 158M passengers.
- **Airports:** Heathrow is by far the top airport in the UK with 585 average movements per day over the last week (still operating at -57% compared to last year). Gatwick was the 5th UK airport for that week compared to the same week in 2019 where it was 2nd.
- **Aircraft Operators:** Ryanair has been the first major airline to restart flying in the UK through various steps (on 1st July and 1st August). Since then, it has been decreasing, reaching -58%. easyJet started later, was close to Ryanair in August and September but decreased more in October, reaching -74%. British Airways restarted also in July and made a big step up in October, operating at -60% last week.
- **Market segments:** All cargo remained stable. Non-scheduled were less affected than Traditional or Low Cost. Business aviation recovered quicker but situation deteriorated in September.
- **Traffic flows:** Domestic flows remain the top flows (-53% over 2019) followed by flows from/to Spain, Germany, Italy and Turkey. Top non-European flows are with North-Atlantic, Middle-East and Asia-Pacific.

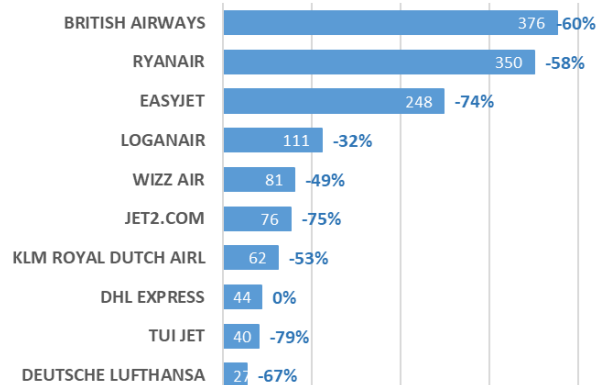
UNITED KINGDOM - Top 10 Airports

Week from 06-Oct-2020 to 12-Oct-2020
avg daily movements (dep+arr) and % vs. 2019



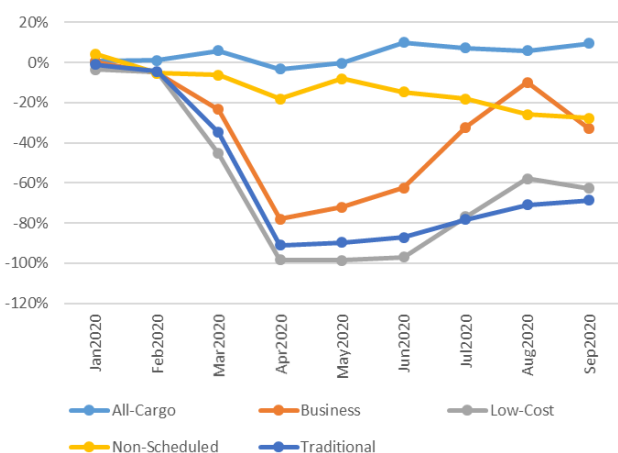
UNITED KINGDOM - Top 10 Aircraft Operators

Week from 06-Oct-2020 to 12-Oct-2020
avg daily flights (dep/arr) and % vs. 2019



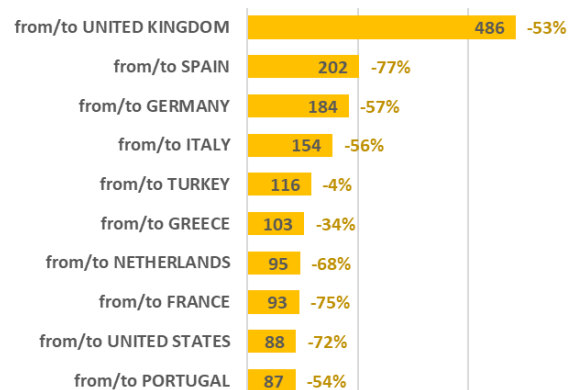
UNITED KINGDOM - Market Segments

Monthly variation % vs 2019



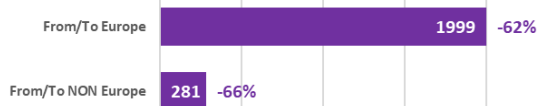
UNITED KINGDOM - Top 10 Country Pairs

Week from 06-Oct-2020 to 12-Oct-2020
avg daily flights (dep/arr) and % vs. 2019



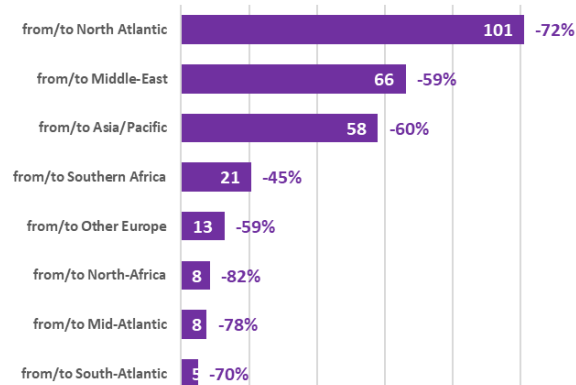
UNITED KINGDOM - Top Region Pairs

Week from 06-Oct-2020 to 12-Oct-2020
avg daily flights (dep/arr) and % vs. 2019



UNITED KINGDOM - Top Region Pairs

Week from 06-Oct-2020 to 12-Oct-2020
avg daily flights (dep/arr) and % vs. 2019



SUPPORTING EUROPEAN AVIATION



Data Sources:

- ¹ ACI.
- ² Oxford Economics.
- ³ Bloomberg (16 September 2020).
- ⁴ John Hopkins University.

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